



Departmental Quarterly Performance Report

Department Name: Office of Performance Improvement

Reporting Period:

2002/03

4th quarter

| | |
|---------------------------------------|-------------------|
| I. Performance Initiatives | Page 2 - 6 |
| II. Personnel Status | Page 7 |
| III. Financial Performance | Page 8 |
| IV. Department Director Review | Page 9 |

Departmental Quarterly Performance Report
Department Name: Office of Performance Improvement
Reporting Period: FY 2002/03 – 4th Quarter

MAJOR PERFORMANCE INITIATIVES

Describe Key Initiatives and Status

Check all that apply

| | |
|--|--|
| <p>Initiative: Support the Efficiency and Competition Commission in tracking and monitoring countywide efficiency projects.</p> <p>Performance Measure: Compile and update project information into a monthly status report for distribution one week prior to Efficiency and Competition Commission (ECC) meetings.</p> <p>Status Update:</p> <ul style="list-style-type: none"> Streamlined ECC reporting to coincide with departmental quarterly performance reporting. Due to the summer recess and cancellation of the September meeting, no meetings were conducted this quarter. | <p><input checked="" type="checkbox"/> <i>Strategic Plan (ES9-5)</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>ECC Project</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p> |
| <p>Initiative: Conduct and oversee efficiency projects including process reviews, managed competition/target savings initiatives and gainsharing.</p> <p>Performance Measure: Conduct a countywide efficiency idea gathering effort with the aim of identifying up to approximately 80 new areas of study.</p> <p>Performance Measure: Identify 6 target savings initiative/competition projects or create Memorandums of Understanding that incorporate managed competition, target savings initiatives and/or gainsharing elements.</p> <p>Performance Measure: Complete 15 projects using in-house resources; oversee or participate in 20 additional projects.</p> <p>Status Update:</p> <ul style="list-style-type: none"> Current countywide work plan consists of 219 active efficiency related projects, 101 efficiency "ideas" and an additional 87 implemented projects which are now monitored for savings. In order to focus on key initiatives and reduce reporting requirements, we worked with departments to establish a single project list of 37 "impact" projects. These projects will form the basis of ECC reporting. Identified and assisting in the following three target savings initiative/competition projects: <ol style="list-style-type: none"> Fire and Rescue - Finalized agreement between GSA and Fire for transfer of facility and resources for heavy equipment maintenance. OPI will be involved in an annual performance review. GSA/Human Services - Finalized bid for industry comments that incorporates a managed competition between GSA and private providers for preventative maintenance services. Procurement is expected to issue the bid in November. CAA/Human Services- Assisting Corrections in examining possibility of having Corrections Food Services provide meal service for DHS and CAA. | <p><input checked="" type="checkbox"/> <i>Strategic Plan (ES9-5)</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>ECC Project</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p> |

Departmental Quarterly Performance Report

Department Name: Office of Performance Improvement

Reporting Period: FY 2002/03 – 4th Quarter

| | |
|--|--|
| <ul style="list-style-type: none"> • Creating the following MOU's: <ol style="list-style-type: none"> 1. WASD - Met with Department Director and Assistant County Manager to review multiple MOU concepts. Held multiple sessions with WASD representatives to identify department measures. 2. Corrections and Rehabilitation - Finalized agreement and received Board approval for a new multi-year gainsharing agreement. 3. Finance - Working with Credit and Collections to develop a gainsharing agreement. 4. South Florida Employment and Training Consortium (SFETC) - Advised SFETC on distribution method for state bonus funds. • Completed or provided oversight to seventeen projects year-to-date including: <ul style="list-style-type: none"> • Medical Examiner Operations Review • Swim Apparel MOU • Snack ITB • Incorporation and Competitive Government • Tax Collector 4 x 10 Review • Public Works - Construction Contract Payment Process Review • Corporate Sponsorship - Policy and Report • Department Director Quarterly Reporting • Survey Pool - County wide and UMSA Surveys • Corrections and Rehabilitation - New Target and MOU for Food Services • Fire and Rescue/GSA - Heavy Fleet Maintenance MOU • Procurement Consolidation - Report issued and scheduled to be presented to Budget and Finance Committee. • Review Placement of ITBO Business Office • Preliminary Review of Parks Budget and UMSA Subsidy • OPTM-Transit Organizational Review • GSA Stores Analysis • Review of Domestic Violence Oversight Board | |
| <p>Initiative: Support and institute countywide strategic planning project.</p> <p>Performance Measure: Finalize individual strategic area master plans and support departmental implementation.</p> <p>Status Update:</p> <ul style="list-style-type: none"> • Completed Enabling Strategies component of Strategic Plan. • Worked with OMB to restructure the County Manager's Proposed Operating Budget to reflect the Strategic Plan goals and priority outcomes – this is now organized by Strategic Area and incorporates goals, and priority outcomes for all six service delivery strategic areas as well as for the Enabling Strategies • Enhanced survey of children and families programs for the Children's | <p><u>X</u> Strategic Plan (ES9-1,ES9-2)</p> <p><u>X</u> Business Plan</p> <p>___ Budgeted Priorities</p> <p>___ Customer Service</p> <p>___ ECC Project</p> <p>___ Workforce Dev.</p> <p>___ Audit Response</p> <p>___ Other _____ (Describe)</p> |

Departmental Quarterly Performance Report

Department Name: Office of Performance Improvement

Reporting Period: FY 2002/03 – 4th Quarter

Budget as well as the Performance-Based Program review process to ensure consistency and linkage to the Strategic Plan as well as to avoid preparation of duplicative information by departments.

- Continued meeting with Commissioners to refine the County's vision statement.
- Finalized work plan for deployment of strategic plan and performance excellence throughout County government departments: Results-Oriented Government
 - Developed content, format and materials for all-day conference with the County Manager and Department Directors to roll-out "Results-Oriented Government", establishing the linkage of the strategic plan to major initiatives including: business planning and budgeting; performance measurement; listening to our customers through the results of the 2003 resident survey; quarterly reporting; and senior management performance appraisals
 - Met with All Assistant County Manager's to solicit input on the proposed approach and revised accordingly
- Developed new website, format, template and instructions for all Departmental Business plans to
 - Emphasize linkage to the strategic plan
 - Further emphasize the need for measurable performance objectives
 - Provide a two-year outlook (final current-year plan and outlook for next fiscal year)
 - Allow Departments to identify critical success factors for the current and next fiscal year that could impact their ability to achieve business plan objectives in the short-term, and strategic plan objectives in the longer term – providing early input to the budget development process
 - Identify "ownership" within the department, thereby providing accountability
 - Requires that FY 03-04 Business Plan and FY 05 Outlook be completed by December 15, 2003
- Worked with the prior Office of Public Transportation Management (OPTM), Miami-Dade Transit (MDT) and the Public Works Department (DPW) to enhance business plans, including:
 - Trained OPTM, MDT and DPW staff in business planning requirements, emphasizing linkage to the Miami-Dade County Strategic Plan
 - Evaluated existing plans for OPTM, MDT and DPW, identifying duplication among plans and deficiencies in addressing Strategic Plan priorities
 - Developed draft business plans in the new standard format (see above) for the newly created Secretariat for the Citizens Independent Transportation Trust as well as the re-organized Miami-Dade Transit Department

Departmental Quarterly Performance Report

Department Name: Office of Performance Improvement

Reporting Period: FY 2002/03 – 4th Quarter

| | |
|---|---|
| <ul style="list-style-type: none">• Worked with various County Departments to begin training on the new business plan format (Fire, WASD, etc.)• Worked with the Employee Relations Department to deploy performance-based appraisals for all senior management in Miami-Dade County tied directly to measurable objectives contained within Department business plans<ul style="list-style-type: none">○ Developed training program linking business plans to individual performance objectives○ Developed implementation timeline to roll-out performance-based appraisals beginning October 6, 2003○ Requires that individual measurable performance objectives for all senior management be completed by December 15, 2003 | |
| <p>Initiative: Administer the countywide “Secret Shopper” program, which is designed to evaluate service delivery to our public at the point of service.</p> <p>Performance Measure: Complete the second year (FY 01-02) of the program, by shopping customer service interface points in all County departments within a 12-month period. Plan revamped third year program.</p> <p>Status Update:</p> <ul style="list-style-type: none">• Completed all second year shopping, with all Department Directors receiving reports detailing their results.• Submitted County Manager report summarizing countywide results.• Article announcing results printed in County employee newspaper.• Completed shopping for revised third year shopping cycle, which includes shopping all departments on a bi-annual basis. Preparing department reports summarizing their results. | <p><u>X</u> Strategic Plan (ES1-3,ES1-4)</p> <p><u>X</u> Business Plan</p> <p>___ Budgeted Priorities</p> <p>___ Customer Service</p> <p>___ ECC Project</p> <p>___ Workforce Dev.</p> <p>___ Audit Response</p> <p>___ Other _____</p> <p>(Describe)</p> |

Departmental Quarterly Performance Report

Department Name: Office of Performance Improvement

Reporting Period: FY 2002/03 – 4th Quarter

| | |
|---|--|
| <p>Initiative: Maintain the County Manager's Administrative Orders (AOs).</p> <p>Performance Measure: Update the automated countywide AO system within 10 days of receipt of the final approved AO from the operating department.</p> <p>Status Update:</p> <ul style="list-style-type: none"> Reviewed a total of thirty-one A.O.'s this fiscal year, ten of which were in the third quarter. Twenty-three A.O's uploaded this fiscal year, none of which were in the fourth quarter. All were uploaded within the ten day requirement. Continued to coordinate updates of outdated A.O.s. | <p><input checked="" type="checkbox"/> <i>Strategic Plan (ES8-3)</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>ECC Project</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p> |
| <p>Initiative: Maintain the countywide Procedures Manual.</p> <p>Performance Measure: Update the countywide Procedures Manual on an annual basis by the end of the first quarter of the fiscal year.</p> <p>Status Update:</p> <ul style="list-style-type: none"> Completed process for 2002 countywide Procedures Manual update. Updates, additions and deletions loaded on County web-site in December 2002. Intermediate updates completed as needed. | <p><input checked="" type="checkbox"/> <i>Strategic Plan (ES8-3)</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>ECC Project</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p> |
| <p>Initiative: Generate revenues or in-kind goods and services in support of County operations, through corporate sponsorship agreements.</p> <p>Performance Measure: Establish countywide corporate sponsorship strategy and policy.</p> <p>Performance Measure: Establish two corporate sponsorship agreements.</p> <p>Status Update:</p> <ul style="list-style-type: none"> Conducting final award phase of the County beverage vending agreement. Working with Parks and PMD to finalize scope of a swimwear corporate sponsorship Invitation-to-Bid. Swimwear corporate sponsorship ITB was released. Revised corporate sponsorship strategy report and preferred project list. Conducting meetings to initiate naming rights opportunities for the South Dade Government Center and donation of certain construction materials. | <p><input checked="" type="checkbox"/> <i>Strategic Plan (ES8-2)</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>ECC Project</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p> |

Departmental Quarterly Performance Report
Department Name: Office of Performance Improvement
Reporting Period: FY 2002/03 – 4th Quarter

PERSONNEL SUMMARY

A. Filled/Vacancy Report

| NUMBER OF FULL-TIME POSITIONS* | Filled as of September 30 of Prior Year | Current Year Budget | Actual Number of Filled and Vacant positions at the end of each quarter | | | | | | | |
|--------------------------------------|---|---------------------------|--|--------|-----------|--------|-----------|--------|-----------|--------|
| | | | Quarter 1 | | Quarter 2 | | Quarter 3 | | Quarter 4 | |
| | | | Filled | Vacant | Filled | Vacant | Filled | Vacant | Filled | Vacant |
| | | | 14 | 18* | 15 | 3 | 16 | 2 | 16 | 2 |

* Fourth quarter total positions decreased by one, due to Department Director promotion to County Manager's Office and reorganization of OPI.

Notes:

B. Key Vacancies

Increase in fourth quarter vacancies due to Department Director, Management Consultant Manager and Senior Executive Secretary moving to the County Manager's Office.

C. Turnover Issues

D. Skill/Hiring Issues

E. Part-time, Temporary and Seasonal Personnel

(Including the number of temporaries long-term with the Department)

T.O. includes one filled part-time Management Consultant Supervisor.

F. Other Issues

One consulting position held vacant throughout the year to attain budgeted attrition.

Departmental Quarterly Performance Report
Department Name: Office of Performance Improvement
Reporting Period: FY 2002/03 – 4th Quarter

FINANCIAL SUMMARY

(All Dollars in Thousands)

| | PRIOR YEAR Actual | Total Annual Budget | Quarter | | Year-to-date | | | |
|------------------|-------------------------|---------------------------|---------|------------|--------------|-----------|-------------|--------------------------|
| | | | Budget | Actual | Budget | Actual | \$ Variance | % of Annual Budget |
| Revenues | | | | | | | | |
| ♦ Salary | 0 | 98,000 | 24,500 | 0 | 98,000 | 0 | 98,000 | 0 |
| ♦ Fringe | 0 | 22,000 | 5,500 | 0 | 22,000 | 0 | 22,000 | 0 |
| ♦ | | | | | | | | |
| ♦ | | | | | | | | |
| Total | 0 | 120,000 | 30,000 | 0 | 120,000 | 0 | 120,000 | 0 |
| Expense* | | | | | | | | |
| Personnel | 1,152,404 | 1,168,000* | 292,000 | 239,556 | 1,168,000 | 1,067,167 | 100,833 | 91 |
| Operating | 154,104 | 69,000 | 17,250 | -134,055** | 69,000 | 77,525 | -8,525 | 112 |
| Capital | 9,071 | 12,000 | 3,000 | 3,348 | 12,000 | 10,612 | 1,388 | 88 |
| Total | 1,315,579 | 1,249,000 | 312,250 | 108,849 | 1,249,000 | 1,155,304 | 93,696 | 92 |

* Includes Salary/Fringe reimbursement amounts.

Equity in pooled cash (for proprietary funds only)

| Fund/ Subfund | Prior Year | Projected at Year-end as of | | | |
|------------------|------------|-----------------------------|-----------|-----------|-----------|
| | | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 |
| | | | | | |
| | | | | | |
| | | | | | |
| Total | | | | | |

Comments:

(Explain variances, discuss significant in-kind services, provide status of aged receivables at 30-60-90-+ days and those scheduled for write-off, if applicable)

* Includes Salary/Fringe reimbursement amounts.

** Includes \$167,901 credit for prior professional service charges (Hay and Superlative).

Year to date operating expenses exceed budget due to \$8,771 in travel expenses incurred by Superlative Firm.

STATEMENT OF PROJECTION AND OUTLOOK

The Department projects to be within authorized budgeted expenditures and projects that available revenues will exceed expenses except as noted below:

Notes and Issues:

(Summarize any concern or exception which will prohibit the Department from being within authorized budgeted expenditures and available revenues)

DEPARTMENT DIRECTOR REVIEW

The Department Director has reviewed this report in its entirety and agrees with all information presented including the statement of projection and outlook.

Signature

Department Director

Date_____